

CM/ECF - Version 3.2 ATTORNEY TIP SHEET

- **Menu Items: Navigating the Menu bar**

These new features are enhancements - you may still access any category or event(s) as you always have through the original navigation methods as in previous releases.

With this 3.2 version Menu items can be displayed in cascading tiles by pressing the Alt key along with the letter that is underlined in the menu name, e.g., Alt-u expands the Utilities menu. The designated letter may differ with the browser. When using the Alt key to navigate the menu, you may continue using the keyboard arrows and Enter key to select menu items, or you may simply place your cursor over the item and left click the mouse to select.

A user can now also display the items on a CM/ECF menu by hovering over its name on the main blue menu bar; moving the cursor to the name of a subordinate menu will list its components. Remember, you can still use the original menus as in previous releases, by clicking on the blue menu bar item



By using the Alt-u keystrokes, or hovering the cursor over Utilities on the blue menu bar, the Utilities menu will display as follows:

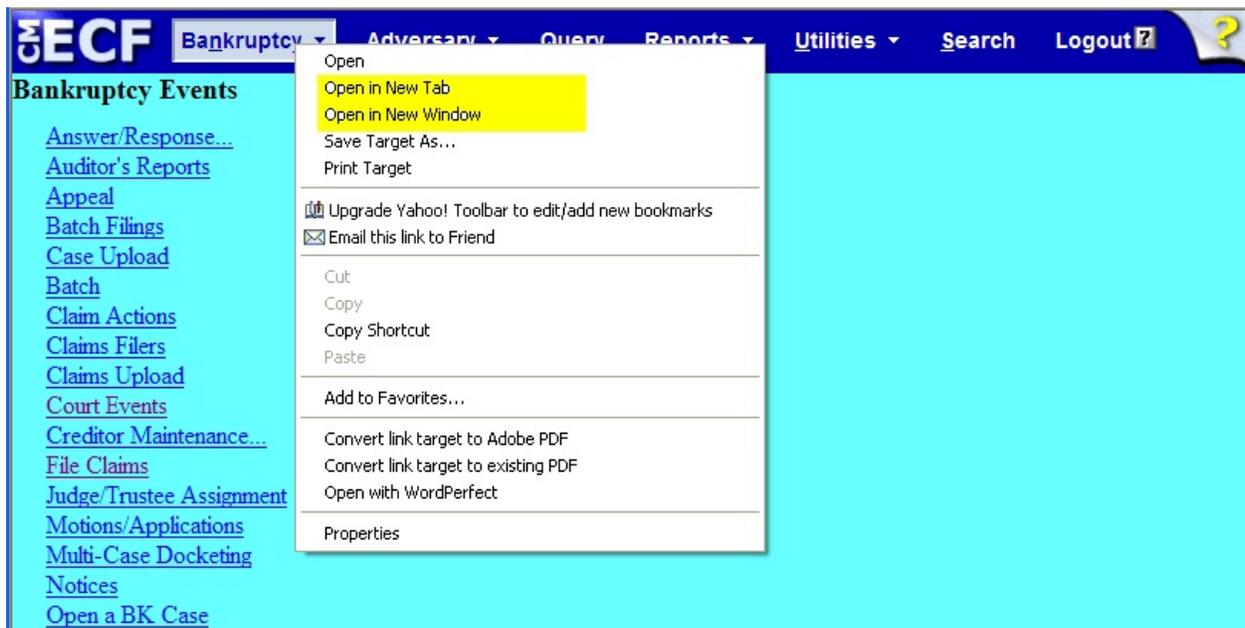


Keep in mind that your options may differ from the options displayed here!

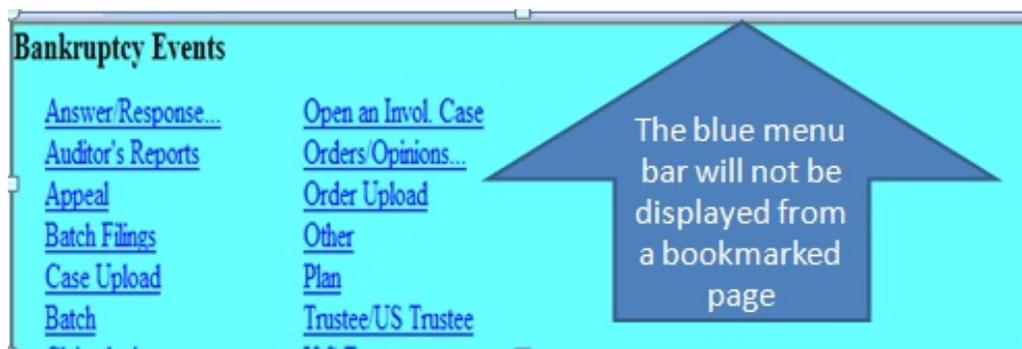


- **Bookmarks:**

It is now possible to create a bookmark for any menu item. This allows a user to put the most-used items on the browser's toolbar or in the bookmark menu; these can then be opened in different tabs or windows. To create a bookmark from a menu item, place the cursor over the item for which the bookmark is being created, right click the mouse, then choose how you wish to mark it - Open in New Tab or Open in New Window.



REMEMBER if you choose to bookmark your menu items, you will not have access to other categories and their respective events, from the bookmarked item because the menu bar will not be available as you can see from the below illustration.



- **Search:** (Keyboard command = Alt-S)

A new item appears on the blue menu bar called Search. This menu item can be used to quickly locate the correct docket event. To use the new menu and event Search, click **Search** on the blue menu bar, or Alt-S keyboard command.



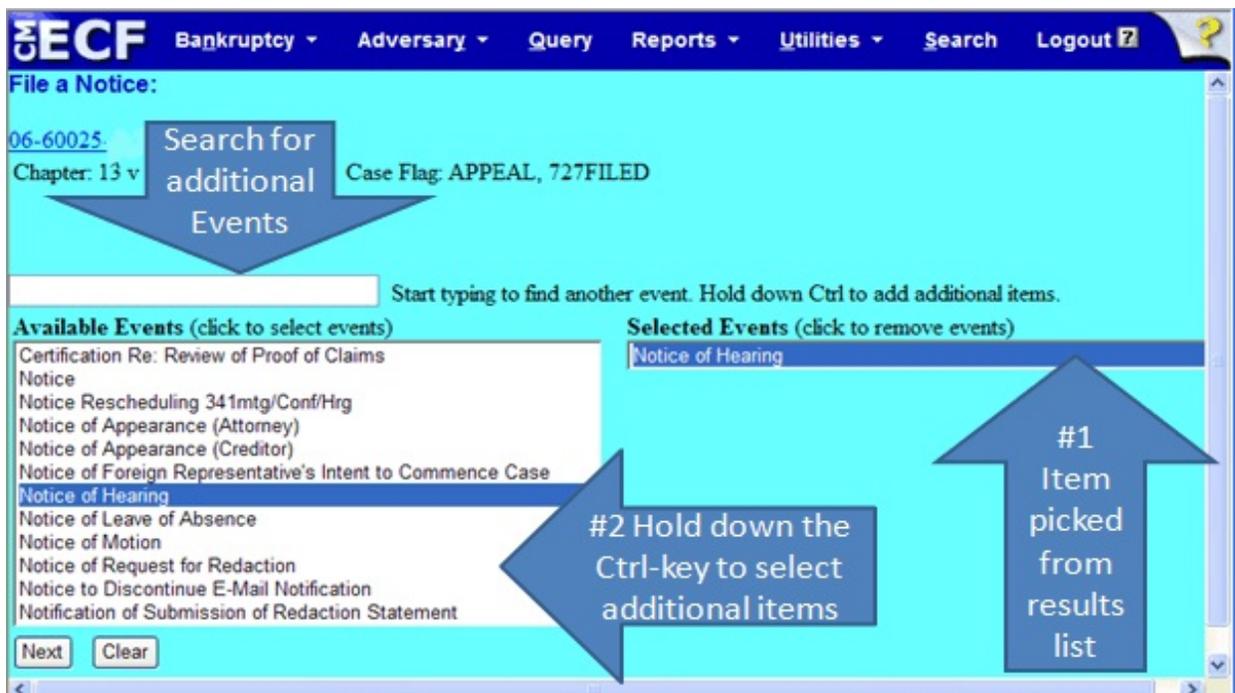
A small pop-up window appears for entering the text to be searched. Once the user enters the text in the search box and clicks the magnifying-glass icon (or presses the Enter key) the results are displayed on the screen, with the search string characters highlighted.



Each result found is a hyperlink to the corresponding menu item or event, so the user can go directly to it. Only letters and numbers can be searched. In the example below, the word “hearing” was searched.

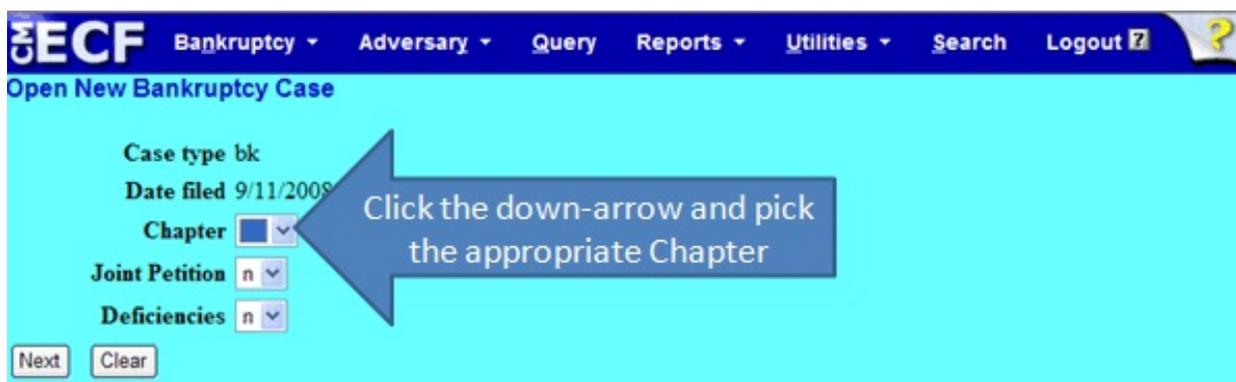


In the following example, the user chose **Bankruptcy Events** → **Notices** → Notice of Hearing. The Event chosen from the results screen will automatically appear in the “Selected Events” list - see #1. From this screen the user can pick additional items from the Event list by holding down the Control key - see #2.



- **Case Opening:**

When opening a Bankruptcy case **not using automatic case upload**, the Chapter field no longer defaults to Chapter 13. If a new petition is filed using Open a BK Case, the user **must** select the correct Chapter by clicking the down-arrow.



From the drop-down menu choose the appropriate Chapter 11, 12, 13, 15, 7 or 9.

- Amended Claims:

When amending a claim you **must** use the Find button to locate and identify the claim being amended.

The screenshot shows the ECF system interface. At the top, there is a navigation bar with links for Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. Below this, the page title is "Proof Of Claim Information For 46433 - Wells Fargo Home Mortgage, Inc. P.O. Box 10335 Des Moines, IA 50306-0335". The form contains several fields: "Case Number: 06-60025-jb", "Last Date To File:", "Last Date To File(Govt):", "Amends Claim #:" with a "Find" button (highlighted by a red arrow), "Date Filed: 09/11/2008", and "Filed By: Creditor". Below these fields is a table for "Amount Claimed" with columns for Unsecured, Secured, Priority, Unknown, and Total (Display Only). There are also fields for "Description:" and "Remarks:". At the bottom, there are "Amend options:" with a radio button for "Clear all Amounts" and "Next" and "Clear" buttons.

After clicking the Find button the user will receive a display of all claims filed in the case. Below is an example of the results screen when using the Find button.

The screenshot shows the results screen in a Windows Internet Explorer browser window. The address bar shows the URL: https://ecf-train.ganb.circ11.dcn/cgi-bin/get_claim_data.pl?caseid=7449&creditorid=46433&claimno=&casenumber=06-60025-jb&creditoridtype=CR. The table below lists the claims:

Creditor Name ↓	Claim #	Date filed
Stawiarski & Associates, P.C.	3	09/11/2008
Triad Financial Corporation	2	09/11/2008
Wells Fargo Home Mortgage, Inc.	1	09/11/2008

When the cursor is placed over the claim list the user will see the Creditor's name and the address associated with that claim.

Creditor Name ↓	Claim #	Date filed
Stawiarski & Associates, P.C.	3	09/11/2008
Triad Financial Corporation	2	09/11/2008
Wells Fargo Home Mortgage, Inc.	1	09/11/2008

P.O. Box 10335 (46433)
Des Moines, IA 50306-0335

The user will select the claim to be amended by clicking on the appropriate (original) claim. Once selected, this process will automatically populate the Amends Claim # field with the claim number which is being amended and populate the Amount Claimed field(s) with the amount(s) identified in the original claim.

ECF Bankruptcy ▾ Adversary ▾ Query Reports ▾ Utilities ▾ Search Logout ?

Proof Of Claim Information For
46433 - Wells Fargo Home Mortgage, Inc.
P.O. Box 10335
Des Moines, IA 50306-0335

Case Number: 06-60025-jb	Amends Claim #: 1 Find	Filed By: Creditor ▾
Last Date To File:	Date Filed: 09/11/2008	
Last Date To File(Govt):		

Amount Claimed

Unsecured	Secured	Priority	Unknown	Total (Display Only)
	1500.00			1500.00

Description:

Remarks:

Amend options: Clear all Amounts

Next Clear

The user **must** click the “Amend options: O Clear all Amounts” radio button or the amount(s) entered for the amended claim will be **added** to the previous amount(s) claimed!

Clicking this radio button will automatically clear the **amount(s)** field(s), but not remove the claim number to be amended. As illustrated below, by clicking the Clear all Amounts radio button the amount is removed, but the claim number to be amended is retained.

CM/ECF Bankruptcy ▾ Adversary ▾ Query Reports ▾ Utilities ▾ Search Logout ?

Proof Of Claim Information For
46433 - Wells Fargo Home Mortgage, Inc.
P.O. Box 10335
Des Moines, IA 50306-0335

Case Number: 06-60025-jb	Amends Claim #: <input type="text" value="1"/> <input type="button" value="Find"/>	By: <input type="text" value=""/>
Last Date To File:	Date Filed: 09/11/2008	
Last Date To File(Govt):		

Amount (Display Only)

Unsecured	Secured	
<input type="text"/>	<input type="text"/>	<input type="text"/>

Description:

Remarks:

Amend options: Clear all Amounts

Claim # to be amended is retained

Click radio button to clear original Amount(s) **before** you enter the new amount(s) on the amended Claim!

- **Adding Creditors:**

When editing creditors to identify them as a member of the Creditor Committee, click the “yes” radio button. The creditor will then be identified as an “Entity” for the purpose of Conflict Checking. By clicking the “yes” radio button for Creditor Committee, a checkmark is automatically placed in the “Entity” box.

The screenshot shows the ECF 'Add Creditor(s)' form. At the top, there is a navigation bar with 'Bankruptcy', 'Adversary', 'Query', 'Reports', 'Utilities', 'Search', and 'Logout'. Below the navigation bar, the page title is 'Add Creditor(s)'. A message states 'Case 06-60025-jb already contains creditors!'. The case number is '06-60025-jb Elijah Collins'. Instructions for name and address entry are provided: 'Name may be 50 characters. Address may be 5 lines, 40 characters each. More than one creditor may be entered. Separate creditors with a blank line.' The 'Name and Address' field contains 'John M. Smith', '123 Oak Street', and 'Atlanta, GA 30303'. The 'Creditor type' dropdown is set to 'Creditor'. The 'Creditor committee' section has 'No' selected with a radio button, and 'Yes' is unselected. The 'Entity' checkbox is also unselected. A callout box with a blue background and white text asks 'Is the creditor being added a member of the Creditor Committee?'. At the bottom, there are 'Next' and 'Clear' buttons.

If the creditor is an individual, **uncheck** the “Entity” box, by clicking it.

This screenshot is identical to the one above, but the 'Creditor committee' section now has 'Yes' selected with a radio button. The 'Entity' checkbox is now checked, and a callout box with a blue background and white text says 'If this creditor committee member is an individual, **uncheck** the Entity box'. The 'Next' and 'Clear' buttons remain at the bottom.

- **Reports, Dockets, and PACER:**

Cases Report will now reflect the Party Role, if the Party information box is checked. The example below illustrates the location of this option.

There are some new features available under **Docket Report**:

1 - There is an option to include a link to the Notice of Electronic Filing which shows the case number, document number, date filed, and the page number(s).

Case number: 1:06-bk-60025

Filed Entered

1/1/1989 to 9/15/2008

Documents: to

Include:

Terminated parties

Links to Notices of Electronic Filing

Sort by: Oldest date first

Run Report Clear

NEF link (**Silver Ball**) is located next to the document number on the **Docket Sheet**.

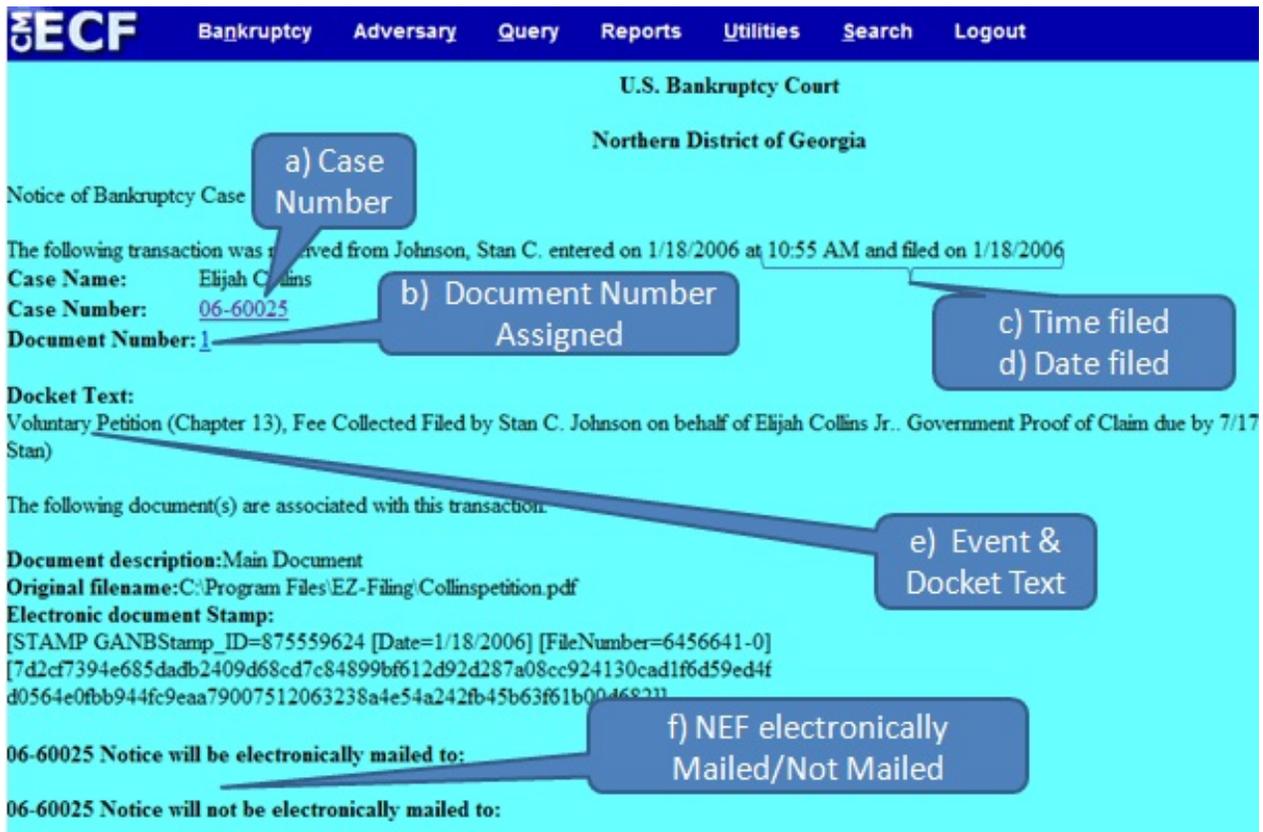
Click the **Silver Ball** next to the document number for the Notice of Electronic Filing. See the example below for an illustration of the silver ball's location and NEF results.

Date	Document Number	Description
10/02/2006	10	Debtor's Intent to Cure Default and Deposit of Rent into Court Registry. \$600.00 filed by Stan C. Johnson on behalf of Elijah Collins Jr.. Deadline to Cure Default: 2/17/2006 (Newsome, Daniel)
10/02/2006	11	Debtors Means Test/Disposable Income Calculation Form filed by Stan C. Johnson on behalf of Elijah Collins Jr.. (Newsome, Daniel)
10/02/2006	12	Debtors Means Test/Disposable Income Calculation Form filed by Stan C. Johnson on behalf of Elijah Collins Jr.. (Newsome, Daniel)

Click the **Silver ball** - then select Html Version radio button, click Display Receipt button.



Notice of Electronic Filing results screen provides all the pertinent information regarding that filing, e.g., a) case number, b) document number, c) time filed, d) date filed, e) docket text, f) notices will be/not be electronically mailed to: The example below identifies the location of this information respectively.



2 - Include headers when displaying PDF documents. This header will provide the case number, document number, dated filed, and the page number(s).

The screenshot shows the ECF Docket Sheet search interface. The top navigation bar includes links for Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. The main form area contains the following fields and options:

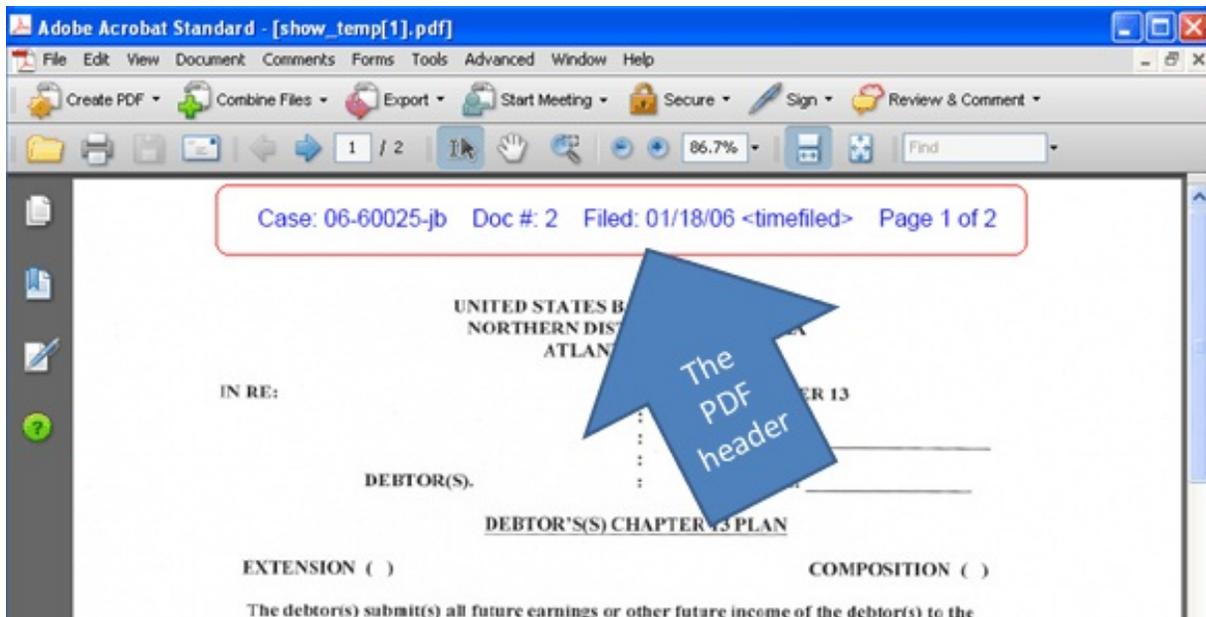
- Case number:** 1:06-bk-60025
- Filed:** 1/1/1989 to 9/15/2008
- Documents:** [] to []
- Include:**
 - Terminated parties
 - Links to Notices of Electronic Filing
- Document options:**
 - Include headers when displaying PDF documents
 - View multiple documents
- Format:**
 - HTML
 - Text
- Sort by:** Oldest date first

Buttons at the bottom include "Run Report" and "Clear".

Annotations:

- A blue arrow points to the "Include headers when displaying PDF documents" checkbox with the text "2 - Include headers on PDF documents".
- A blue callout box points to the "Include headers" checkbox with the text "Click link box before generating Docket Sheet with headers".

The PDF header will display on the document as illustrated below.



3 - Users can view multiple documents by clicking on the View Multiple Documents option, as illustrated below.

ECF Bankruptcy Adversary Query Reports Utilities Search Logout

Docket Sheet

Case number: 1:06-bk-60025

Filed: 1/1/1989 to 9/16/2008

Documents: [] to []

Include:

- Terminated parties
- Links to Notices of Electronic Filing

Document options:

- Include headers when displaying PDF documents
- View multiple documents

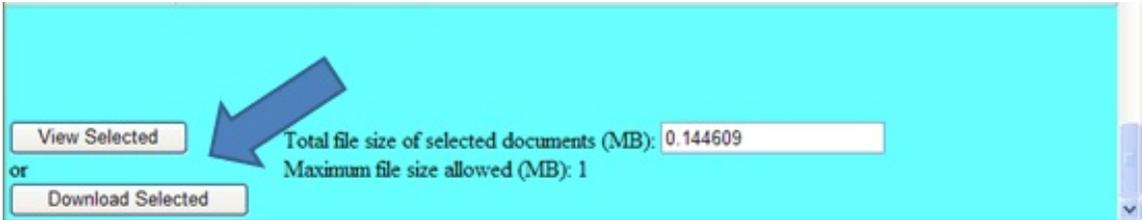
Sort by: Oldest date first

Run Report Clear

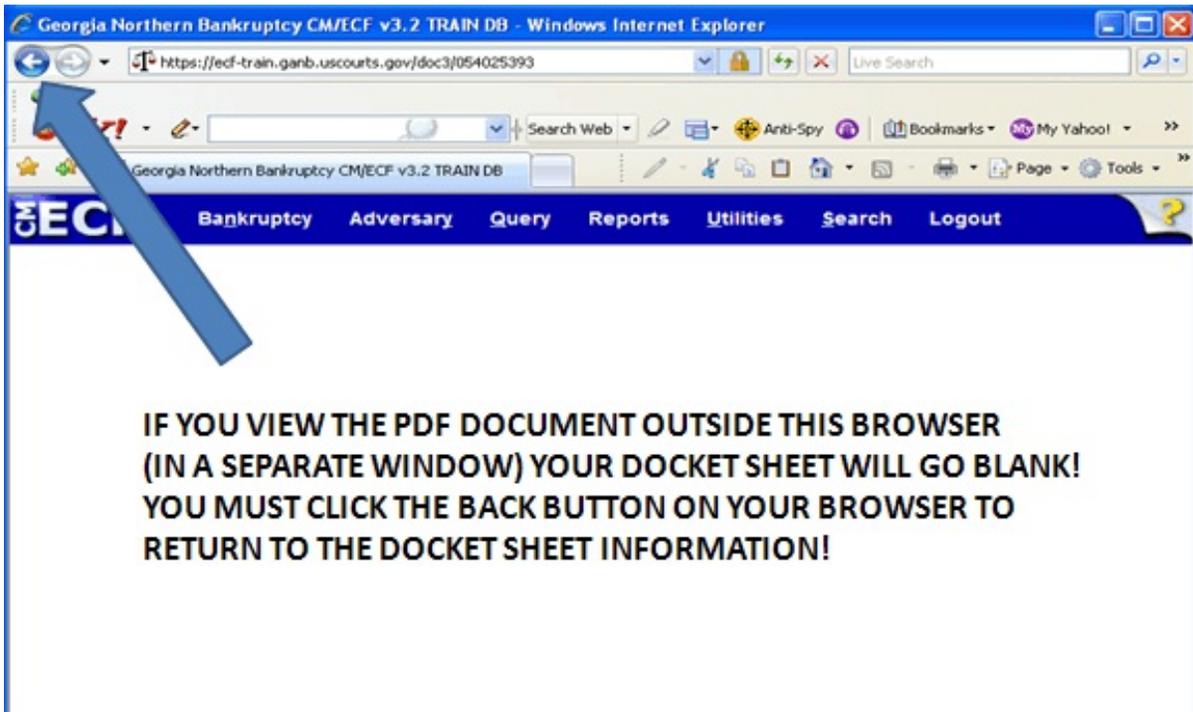
Identify which documents you wish to view by placing a checkmark in the box located between the document number and the docket text, as illustrated below.

Date	Document Number	File Size	Description
10/02/2006	<input type="checkbox"/> 4	36,126 KB	(related document(s) Notice of Appeal (FEE) filed by Elijah Collins) (Newsome, Daniel)
10/02/2006	<input type="checkbox"/> 5	36,126 KB	Transmittal of Record on Appeal to District Court (related document(s) Notice of Appeal (FEE) filed by Newsome, Daniel)
10/02/2006	<input checked="" type="checkbox"/> 6	72,357 KB	Report of Audit with No Material Misstatement Identified. Audited by Newsome, Daniel Additional Document(s) added on 9/4/2006 (Drake, Gary).
10/02/2006	<input checked="" type="checkbox"/> 7	36,126 KB	Report of Audit with No Material Misstatement Identified. Filed by Newsome, Daniel
10/02/2006	<input type="checkbox"/> 8	36,126 KB	Amended Auditor's Report Filed by Newsome, Daniel (RE: related document(s) 6 Auditors Report).
10/02/2006	<input checked="" type="checkbox"/> 9	36,126 KB	Supplemental Auditor's Report Filed by Newsome, Daniel (RE: related document(s) 7 Auditors Report).
10/02/2006	<input type="checkbox"/>		Receipt of Transferred Case from District of Alabama Northern, Case Number 0569541 (Newsome, Daniel)
10/02/2006	<input type="checkbox"/> 10	36,126 KB	Debtor's Intent to Cure Default and Deposit of Rent into Court Registry. \$600.00 filed by Stan C. Johnson on behalf of Elijah Collins Jr.. Deadline to Cure Default: 2/17/2006 (Newsome, Daniel)

After selecting the PDFs, the user can decide to click either View Selected, or Download Selected by clicking the appropriate button located at the bottom of the docket sheet.. The maximum file size allowed in this View Multiple Documents feature is (MB): 1.



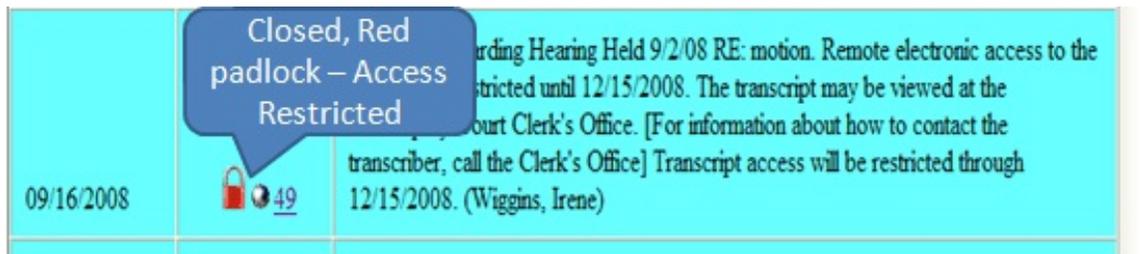
When viewing the pdf document outside the browser (in a separate window), your docket sheet screen will go blank. You **must** click the back button on your browser to return the docket sheet information!



Transcripts:

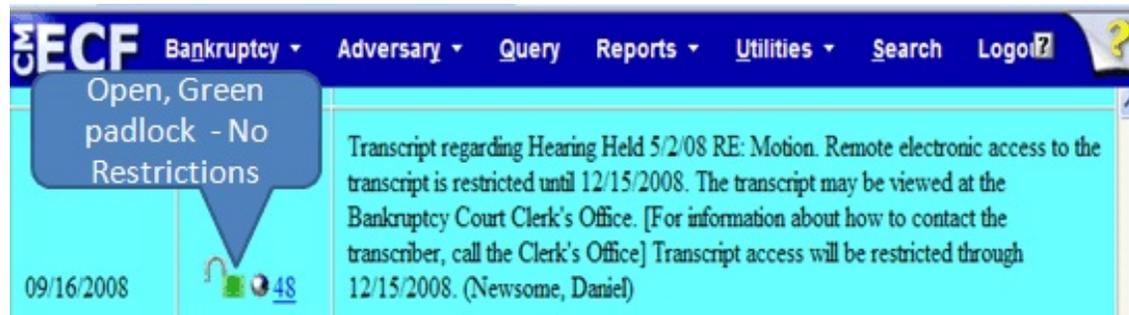
The Judicial Conference has adopted a policy to include official transcripts of court proceedings in electronic case files. After a transcript is filed with the court, it may be viewed (**but not printed**) in CM/ECF at a **public** terminal at the Clerk's office. Any other access to the document by **non-court** users is prevented for **90 days**. However, a user may pay a fee to the court reporter or transcriber to gain access to the document via PACER (with PACER charges applying). Designated court staff will grant permission to such a user. PACER charges apply to the full transcript!

A padlock icon will be displayed next to the document link for a transcript. As illustrated below an open, **green** padlock indicates that access to any and all documents are not restricted; a closed, **red** padlock indicates that access to any and all documents are restricted; and a closed, **yellow** padlock indicates there are multiple documents, some restricted and some not.



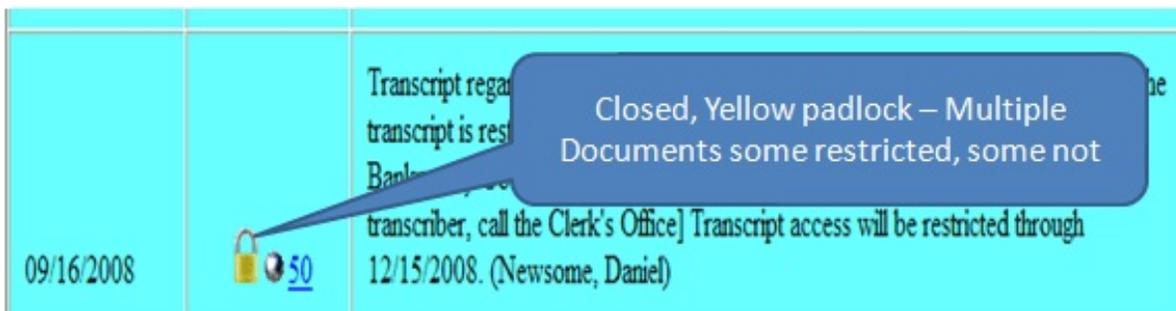
09/16/2008  [49](#) Transcript regarding Hearing Held 9/2/08 RE: motion. Remote electronic access to the transcript is restricted until 12/15/2008. The transcript may be viewed at the Court Clerk's Office. [For information about how to contact the transcriber, call the Clerk's Office] Transcript access will be restricted through 12/15/2008. (Wiggins, Irene)

Closed, Red padlock – Access Restricted



09/16/2008  [48](#) Transcript regarding Hearing Held 5/2/08 RE: Motion. Remote electronic access to the transcript is restricted until 12/15/2008. The transcript may be viewed at the Bankruptcy Court Clerk's Office. [For information about how to contact the transcriber, call the Clerk's Office] Transcript access will be restricted through 12/15/2008. (Newsome, Daniel)

Open, Green padlock - No Restrictions



09/16/2008  [50](#) Transcript regarding Hearing Held 5/2/08 RE: Motion. Remote electronic access to the transcript is restricted until 12/15/2008. The transcript may be viewed at the Bankruptcy Court Clerk's Office. [For information about how to contact the transcriber, call the Clerk's Office] Transcript access will be restricted through 12/15/2008. (Newsome, Daniel)

Closed, Yellow padlock – Multiple Documents some restricted, some not

When a docket entry contains multiple pdf documents, some of which are restricted and some not, as indicated by the **yellow** padlock, after clicking on the document number a display will be presented to the user identifying which pdfs are restricted and which are not.

